

Fiscal Year 2025 BTA Instructions

General Information:

- BTA information can be accessed on this webpage [here](#)
- FY2025 Budget Turnaround (BTA) screens must be submitted to the Budget Office by the College/Unit's final approver to be communicated at a later date.
- Anaplan BTA can be accessed here:

<https://us1a.app.anaplan.com/>

Follow the Login link and use the single sign-on option. Type in your UD email. You will be redirected to the University's login screen.

- FY2025 has been pre-populated with current fiscal year FY2024 budget information for revenue, other labor, and OTPS.
- Actuals information is available for FY2017 through FY2023 in the reporting section.
 - FY2024 actuals may be found using Axiom or UdataGlance management reports
- FY2025 all-funds BTA budgets should be developed at the department level
 - All department level plan files, both Labor & Budget must be approved by College/Unit's final approver
 - Revenue and OTPS (which includes transfers) budgeting are located in section 3
 - Position budgeting (Professional, Faculty, Salaried Staff) are located in section 4
 - Other wages budgeting (S-Contracts, Graduate Stipend, Wages,...) are located in section 5
- Be sure to budget in a way that is reflective of activity.
- Feel free to reach out to your analyst if you need assistance/guidance with Anaplan functionality with reaching target budget by line and by fund.

General assumptions:

Tuition Increase (Resident & Non-Resident)	4.0%		
Benefit Rates	Internal	External	Federal AG
Faculty and Professionals - Exempt	48.7%	41.9%	34.7%
Staff - Non Exempt	82.9%	58.0%	39.7%
Graduate Students	9.0%	12.3%	12.3%
Other	8.0%	8.6%	8.6%

- Central support: amounts will be populated once budget plans are approved by President, Provost or EVP
- Transfers: transfer budgets have been set to \$0 (incl. year-end sweep and F&A transfers) to facilitate budget re-setting
 - New transfer accounts 199716 (transfer within the same DetID) and 199717 (transfer within the same major unit) should be used wherever appropriate.
 - See transfer guidelines <https://sites.udel.edu/vpfinance/files/2024/07/Transfer-Chart-May-2024.docx>

- Position budgeting is based on HR salary information as of July 22, 2024.
 - FY25 scheduled salary increases for employees on academic contracts are not in BTA. Units should review and update accordingly.
- Position salary distribution is based on current LAM distribution as of July 22, 2024.
- Salary Offload:
 - For units needing to budget additional salary offload at a summary level, please use 120298 (professional offload), 121198 (faculty offload), or 123098 (staff offload) in the Other Labor section in section 5.
 - 120298 – 121198 – 123098 salary offload budgets should net to \$0 across fund types.

If you have specific questions regarding your budgets, please email your Budget Analyst. Contact information is on our web site at: <http://sites.udel.edu/budget/home/staff-and-contacts/> .

If you encounter any technical problems with the BTA Online System, please contact wf-budgetofficebta@udel.edu. We need to be aware of any problems or concerns and welcome your questions.

Reserve and deficit policy can be found here <https://sites.udel.edu/generalcounsel/policies/financial-deficits/>

Basic Budget (11 fund type)

- Budget by individual departments, and purpose codes
- FY2025 central support amounts will be populated once budget plans are approved by President, Provost or EVP

Self-Supporting (21 fund type)

- Budget by individual departments, and purpose codes
- Individual self-supporting operations must net to \$0 - use the appropriate year-end sweep account (199721 for intra-fund year-end sweep such as a 21 to a 17 reserve or 199821 for inter-fund year-end sweep such as a 21 to an 85 reserve) as a balancing tool.

Allocated (17 fund type)

- Each department has a unique budget holding purpose (eg DISA1777__)
- Includes summary historical information from individual 17 purpose codes
- Budget Office will balance using account 1MRGIN by means of an automated process during final review

Service Centers (18 fund type)

- Each department has a unique budget holding purpose (eg DBIO1877__)
- Includes summary historical information from individual 18 purpose codes
- Budget Office will balance using account 1MRGIN by means of an automated process during final review

Faculty Startup (19 fund type)

- Each department has a unique budget holding purpose (eg ENTO1977__)
- Includes summary historical information from individual 19 purpose codes
- Budget Office will balance using account 1MRGIN by means of an automated process during final review

Gifts (41 fund type)

- Each department has a unique budget holding purpose (eg MASC4177__)
- Includes summary historical information from individual 41,45 purpose codes
- Budget Office will balance using account 1MRGIN by means of an automated process during final review

Endowment (46 fund type)

- Each department has a unique budget holding purpose (eg SCHL4677__)
- Includes summary historical information from individual 46,47 purpose codes
- Budget Office will balance using account 1MRGIN by means of an automated process during final review

State Restricted (22 fund type)

- Budget by individual departments, and purpose codes
- Revenue and expense must net to \$0 in each purpose code

Sponsored (31 fund type)

- Each department has a unique budget holding purpose (eg PHYS3177__ or AGR13A77__)
- Includes summary historical information from individual 3A, 31-37,42,43 purpose codes
- Revenue and expense must net to \$0 for each department

Capital (85 fund type)

- Each department has a unique budget holding purpose (eg RNOV8577__)
- Includes summary historical information from individual BLDG,85 purpose codes
- Budget Office will balance using account 1MRGIN by means of an automated process during final review

Debt Servicing (83 fund type)

- Budget by individual purpose codes
- Includes summary historical information
- Budget Office will balance using account 1MRGIN by means of an automated process during final review